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ABSTRACT

PERT (Program Evaluation and Review Technique), an approach developed by the Navy to identify time and cost resources and organize steps to streamline management, can smooth the special education referral process. PERT is a sophisticated scheduling method which, when adapted to the district, can expose bottlenecks, accurately estimate timelines, and provide for ongoing monitoring. Definition of objectives and breakdown of the work are the initial steps. The project is subdivided into small and easily managed units. The process of subdivision continues until the desired level of detail is reached. A network is then developed showing the interrelationships and priorities of the steps needed to reach the objectives, including time specifications, staff responsibilities, and cost estimates. Use of the PERT system can be taught to anyone involved in managing the referral process in a half day workshop or three hourly sessions. (CL)

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How the US Navy Can Help Take the Pain out of the Referral Process

Presentation at the CEC National Conference in Detroit, 1983

Marguerite C. Radencich

This paper describes the usefulness of PERT (Program Evaluation and Review Technique) in streamlining the currently cumbersome psychological referral process. With PERT, realistic time and personnel needs can be established so that the referral process can be completed within reasonable time limits. In addition, the status of every referral can be known at all times.

A sample work breakdown structure for referrals is developed as the initial step in PERT. With this step, the process is broken down into small manageable units. Based on this, a network is developed. The network shows the interrelationships and priorities of the steps needed to complete the referral process.

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It sometimes seems that the psychological referral process is a perpetual treadmill designed to ensure that children never get placed in special education classes. What is needed is a system which can keep the process manageable. PERT (Program Evaluation and Review Technique) is such a system.

PERT was developed by the Special Projects Office of the Navy Department in 1958. The use of PERT in the development of the Polaris weapon system is said to have contributed significantly to a two-year reduction in the time needed for its completion (Strong & Smith, 1968, p.90).. PERT has since been used in numerous fields ranging from home construction to Broadway plays. Guidelines for educational applications of PERT are provided by Cooke (1979).

More time is lost and more dollars are expended because of a lack of sound initial planning and followup in management than for any other reason (McMahon, Campbell & Morrissy, 1981). PERT is an efficient and flexible tool which can help prevent these problems by identifying time and cost resources and by organizing the steps needed in streamlining a variety of management processes. PERT has unique characteristics which make it applicable to the referral process.

PERT is most useful when:

1. Time and resources must be planned
2. Some complexity is involved
3. A person has no related experience
4. Logical rather than creative thinking is called for

5. There is involvement of a minimum of 1-2 persons, 2 months, and/or 20-25 events
6. Progress is to be reported on a consistent basis
7. A goal is to be met by a given deadline

PERT is a sophisticated method of scheduling which can be adapted for use in the referral process of any district. With it, possible "bottlenecks" are exposed, and realistic time and personnel needs are established. Thus, the timing of the referral process can be estimated accurately. In addition, PERT allows for a constant monitoring of the status of every referral in process.

Work Breakdown Structure

The use of PERT as a management technique begins with a definition of objectives. The work breakdown structure, which reflects a top-down approach to planning, serves as the initial step. At this stage a project is subdivided into small and easily managed units. The process of subdivision continues until the desired level of detail is reached. Figure 1 is a sample work breakdown structure for referral procedures in Dade County, Florida.

Insert Figure 1 about here

Network Development

A network is the foundation of PERT. It shows the interrelationships and priorities of the steps needed to reach objectives. It is a graphic representation of the plan. The network is based on the work breakdown structure. Network construction should involve all those who will take

part in its use. This is particularly necessary with regard to time estimation. This will lead to a sense of responsibility to complete activities in the estimated time. If, e.g., a busy speech therapist is asked to complete a speech evaluation whenever he/she can, the request might wind up at the bottom of a pile of paperwork. If, on the other hand, the same speech therapist is held to the time estimate given, it is more likely that the evaluation will be completed on time.

After completion of the network, it can be modified as needed throughout the referral process. Figure 2 depicts a network based on the work breakdown structure of Figure 1.

Insert Figure 2 about here

Detailed explanations of the steps involved in the construction of the work breakdown structure and of the network are available in Cook, 1979. Explanations for the computation of time and cost factors can be found in the same source.

PERT can be used by anyone who is involved in the management of the referral process. Higher level administrators can teach the process to school level personnel. Learning the use of PERT must involve hands-on practice in constructing work breakdown structures and networks. Approximately three hours should be allowed for such instruction. Training could be completed in a half-day workshop or in hourly sessions. In the latter case, work

breakdown structures could be taught in the first session, networks in the second, and the computation of time and cost in the third. Alternately, instruction on time and cost computation might be omitted for school level personnel.

Conclusions

The referral process as it exists at present is in dire need of streamlining. PERT provides a way of accomplishing this goal. It is not the only way. Schiffman et al (1982) discuss a software program which can track a student from referral through placement and beyond. This software was developed for Radio Shack's TRS-80 model III and is adaptable to other hardware. This program may be the optimum solution. But as of now, many schools do not have the computer capability to manage the referral process in this fashion. PERT provides a viable alternative.

References

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Figure 1
PERT REFERRAL WORK BREAKDOWN STRUCTURE

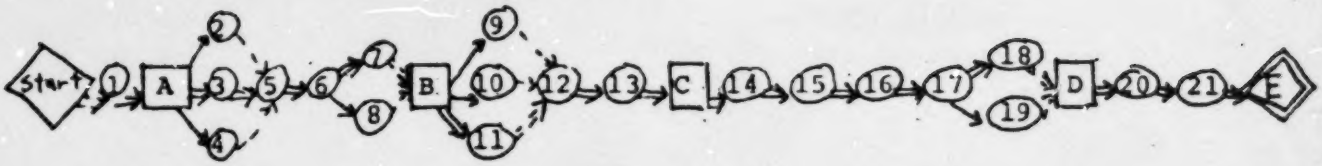
Referral Process	Level 1	Level 2	Level 3
	Initiation	Initiator speaks to school administrator.	
		Administrator evaluates case & gives out packet.	
		Teacher completes packet.	Teacher fills out observation form & strategies.
			Teacher asks 2nd teacher to fill out observation form.
			Teacher confers with parent.
		Teacher returns packet to administrator.	
	CST (Child Study Team)	Administrator checks packets & schedules CST with psychologist.	Administrator informs teacher & parents of CST.
			Administrator arranges for coverage for classroom teacher.
		CST meets; decision is made to test child.	

Figure 1 - continued

Referral Process	Level 1	Level 2	Level 3
	Evaluation	Administrator gathers reports for psychologist.	Administrator obtains visiting teacher report.
			Administrator obtains speech & hearing report from speech teacher.
			Administrator obtains vision report from school nurse.
		Administrator copies packet & sends one copy to Area Office.	
		Psychologist receives packet.	
		Psychologist tests child.	
		Secretary types report.	
		Psychologist proofreads report.	
		Secretary sends report to Area Office.	
	Staffing	Area Office calls administrator & arranges staffing date.	Administrator informs teachers & parents of staffing.
		Staffing is held; decision is made to place child.	
	Placement	Permission for placement is signed.	
		Transportation is arranged.	
		Placement begins.	

PERT

Figure 2
PERT Objective : Streamline referrals



1. Referral packet has been requested.
A. ADMINISTRATOR HAS GIVEN PACKET TO TEACHER.

2. Teacher has conferred with parent.
3. Teacher has filled out observation form and strategies.
4. Second teacher has filled out observation form.
5. Teacher has returned packet to administrator.
6. Administrator has checked packet and scheduled Child Study Team.
7. Parents, teacher and psychologist have been informed of CST schedule
8. Classroom coverage for teacher has been arranged.
B. DECISION HAS BEEN MADE IN CHILD STUDY TEAM TO TEST CHILD.

9. Speech and hearing report has been obtained.
10. Vision report has been obtained.
11. Visiting teacher report has been obtained.
12. Packet has been duplicated - one copy has been sent to Area Office.
13. Psychologist has received packet.
C. CHILD HAS BEEN TESTED BY PSYCHOLOGIST.

14. Report has been typed by secretary.
15. Report has been proofread by psychologist.
16. Report has been sent to Area Office.
17. Area Office has called school with staffing date.
18. Administrator has informed parents and teacher of date.
19. Administrator has arranged for classroom coverage.
D. DECISION HAS BEEN MADE AT STAFFING TO PLACE CHILD.

20. Parent permission for placement has been signed.
21. Transportation has been arranged for.
E. CHILD HAS BEEN PLACED.